# GM600 MBA Capstone

# TEAM CHARTER

# Team Information

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TEAM: | | |  | TEAM DURATION:      8 weeks | | |
| DEPARTMENT: GM600 | | |  | REPORTING TO: J. HootmanHis Contact Info: 503-430-4566, jwhootman01@comcast.net | | |
| MEMBER NAME | # | PHONE # |  | EMAIL |  | AVAILABILITY |
| Tara Backes | 1 | 503-432-5864 |  | [Tnbackes@me.com](mailto:Tnbackes@me.com) |  | Afternoons after 2pm |
| Tom Nicolosi | 2 | 801-850-3386 |  | [tomnicolosi@hotmail.com](mailto:tomnicolosi@hotmail.com) |  | After 8 m (Off Monday-Wednesday) |
| Nicodemus Pederson | 3 | 503-962-0642 |  | [ngjpederson@live.com](mailto:ngjpederson@live.com) |  | After 8pm (works weekends) |
| Maria Ana Yagi | 4 | 626-808-6769 |  | [Maria.ana@vanilla.ocn.ne.jp](mailto:Maria.ana@vanilla.ocn.ne.jp) |  | Any time |

# 

1. **Team CAPSTONE PROJECT Description**

# *Our client is John Bennett, instructor at Keller Graduate School. He is interested in establishing a Vodka distillery in Vancouver, WA.*

# *His contact information: 360-600-2660, healthinc2000@yahoo.com*

# Team Management Plan

**Team Leader**: *Tara Backes*

1. Deliverable Management:

|  |  |  |
| --- | --- | --- |
| **Deliverable** | **Due** | **Division Leader Assigned** |
| **Environment Analysis** | **Week 2** | **Tom Nicolosi** |
| **Marketing Plan** | **Week 3** | **Maria Ana Yagi** |
| **Operations Plan** | **Week 4** | **Nicodemus Pederson** |
| **Financial Plan** | **Week 5** | **Tara Backes** |
| **Final Business Plan** | **Week 8** | **Tara Backes** |

1. Communication Plan:

*WEEKLY:*

* *5:00pm Monday Meeting with John Bennett*
* *9:00pm Wednesday Conference Call using \_\_\_\_\_\_\_*

*Other Planned Meetings:*

* *Sunday, March 4th 3:30pm with John Bennett @ Distillery in Vancouver*
* *Sunday, April 15th 3:30pm at Keller to do final review and presentation review*

1. Documentation:

How will documentation be shared and stored?

*-All documents will be emailed to Tara Backes for initial review. She will post documents in the Team Area in the Course Shell, and send everyone an email to be reviewed by the team.*

*-Jay and John will be CC’d on all emails to the team.*

When will documents be delivered to the team leader for submission to the drop box?

*-All documents will be emailed to Tara Backes Friday before they are due. This will give the team the weekend for edits, and she will turn them in on Monday.*

1. Change Management:

*-Edits will be posted within the course shell with the same Document Title and your initials.*

*(Example: GM600\_Team\_CharterTB.doc, or GM600\_Team\_ChaterTBrev2.doc)*

*Division leader will use their initial document and make and add edits to their original document as necessary. When it is a document that the division leader has created no initials are necessary, but revision should be included.*

*(Example: GM600\_Financials.doc, or GM600\_Financialsrev2.doc)*

*If you have edits- save the document with your initials attached and make edits (either highlight what you want or think needs changed, or use Word's editing tools!) Email it to the person in charge of the document (DIVISION/TEAM LEAD) and post it back on the class shell so that others can look at your edits or expand on them.*

1. Skills Inventory:

|  |  |  |
| --- | --- | --- |
| **Name** | **Strengths** | **Weaknesses** |
| Tara Backes | Organization, Editing, Detail Oriented towards the Big Picture | Impatient, Cares a lot about grades/final project, Can be critical of other’s work |
| Tom Nicolosi | Leading, Provides and Demands Quality, Good Vision of the Big Picture | Pushing Deadlines, Excel |
| Nicodemus Pederson | Timeliness, Organization, Vision | Pushing Deadlines, No Car (for future meetings) |
| Maria Ana Yagi | Math/Research, Deadline Oriented, Responsible | Writing/English, Communication |

1. **TEAM/PROJECT RISKS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ID | Risk | Likelihood (High/Med/ Low) | Impact (High/Med/ Low) | Prevention |
| 1 | Not Completing Tasks | MED | HIGH | Setting Deadlines Early, Creating Charter/Strategy Plan |
| 2 | Not Completing Project | LOW | HIGH | Communication, Setting Deadlines Early, Creating Charter/Strategy Plan |
| 3 | Unsupported Research | HIGH | MED | Wikipedia is not a source, Using Student Resources/Library, Using John’s research and validate our sources |
| 4 | Lack of Research Material | MED | MED | Analysis, using John’s knowledge |
| 5 | Miscommunication | HIGH | HIGH | Team Charter/Strategy Plans, Contact information, and establishing open/honest communication up front |
| 6 | Scheduling | LOW | MED | Class time, already established some meeting times, and conference calls, ability to be flexible and willingness to work for the final project |
| 7 | Lost Work | HIGH | MED | Wikispaces will save research; all other will be saved via emails and the course shell. Each teammate will back up their work individually. |
| 8 | LIFE | HIGH | MED | Communication, and willingness to help each other to create a successful final project |

1. **CRITICAL SUCCESS FACTORS**

|  |  |  |  |
| --- | --- | --- | --- |
| ID | Critical Success Factors | Reason for Importance | Steps Taken to Ensure Attainment |
| 1 | Communication | Failure to Complete Project | Sharing contact information, RACI, Team Charter and establishing open communication paths early |
| 2 | Scheduling | Failure to Complete Project, and getting work done on time | Setting up timeline in advance, and ability to work for the good of the team and final project. Each team member is willing to help each other if something happens. |
| 3 | Quality of Work | Approval of Investors, Ability to Graduate and Final Grade | We will all review each document, and team lead will make sure that our work has one voice. |

1. **CONFLICT MANAGEMENT PLAN**
2. POTENTIAL BARRIERS AND COPING STRATEGIES:

*-Time Management & Scheduling- We have all acknowledged that it is important for all of us to be at all meetings, and if we cannot be there we will send notes to update the team on our status, and team will share meeting minutes. Each of us is committed to an “A” Project, which is hopefully approved for our Client, which means we are willing to put in the time and research necessary for this project.*

*-Communication & Language Barriers- We know that one of our team member is concerned about the language barrier and we will see to it that at all times she is sure of what she needs to do and is on the correct path. All team members acknowledged that communication is essential to the success of our project, and will take all efforts to keep open and honest communication.*

*-Research- As none of us are experts in the current subject matter, we will all have to spend additional research time to make sure we are on the same page, and we will make sure that our sources are established experts or can be verified by an authority in the market.*

## Team Operational GROUND RULES:

*-Ask for help no matter what, and do not judge those who ask for help!*

*-All Emails should have team CC’d and Professor Hootman CC’d.*

*-Do not CC John on all emails; please send only specific questions and Team Leader will send periodic status updates for review.*

*-Do not make assumptions, get facts!*

*-Participate in all meetings and conference calls- if you cannot be there or will be more than 5 minutes late please let the Team Leader know!*

*-Status updates will be required in the mid-week conference call.*

*-Submissions are due Friday for team review, Final Edits are due by Monday morning to be turned in by Team Lead.*

1. How will you manage conflict?

*-Up Front and Honest communication*

*-All critiques must be about the work, and have factual basis.*

*-Listen with Humility (please remember we all want a great project, and we value each other’s time and effort put into the project)*

1. Plan for minor disagreements, inability to agree on submissions?

*-Team members agree that all minor conflicts will be handled one on one, particularly if it is of a personal nature. If it is regarding work and edits, and if a compromise cannot be met they will let the group know. If it comes to the attention of the group then the Division Leader has final say regarding the work on their part of the project. If the team disagrees with the Division Leader then the Team Leader will step in. Last resort is to bring conflict to Professor Hootman.*

1. Who will have final say for major disagreements? Majority rule or leader?

*-Team Leader has final say if there cannot be a compromise to establish one voice for the project and team.*

1. What will be the method of communicating with team members who do not deliver?

*-If division leader does not have their materials in by Saturday Morning- Team Leader will call them to check in. Team will be contacted if the division leader cannot produce their materials that day, but will be updated as necessary.*

1. Will your team ask that a member receive less than full credit for an assignment for non-performance? How will this be determined? How much deduction?

*-Team members will decide this upon conclusion of the project and will keep this private in their team and peer reviews. They will share this information only with Professor Hootman. Their reviews will be based upon their work on the whole project, rather than individual submissions.*

1. **Commitment Statement**

*I am committed to making this project a successful and profitable opportunity for John Bennett. I plan to spend 5-10 hours a week working on aspects of this project, and hope that my efforts and leadership will set the tone for the team. My plan is to work on the financial aspect of this Business Plan, while also being the team lead and establishing one voice for this project. Please always feel free to come to me for questions, or if you need anything, and never hesitate to question or edit my work.*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Tara Backes*

*I will work on this project to the best of my ability as I want our project to succeed in this class. I am willing to commit to reviewing the teams posted material and to try to contribute, constructively, to each of your portions of this project. My plan is to work on the environment section for a minimum of an hour daily and to communicate with each of you, at least twice a week in order to keep you aware of my progress. Please feel free to comment on my portions of the project and to ask for assistance with yours.*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Tom Nicolosi*

*Considering my weaknesses, I will do my best not to create trouble for other members. I will allot at least two hours a day for reading and researching. My plan is to work on the marketing analysis. The type of business project is totally new to me, plus I never take alcohol at all, but will take this chance for me to learn another side of the world, and so willing to work on this project seriously. I will humbly acknowledge and respect your comments, suggestions or revisions to my work. I will also post whatever suggestions I have. Please feel free to alarm me if I am not on the right track.*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Maria Ana Yagi*

***\*\*\*\****

*I have set a schedule to work on this project at least 15 hours a week and other activities will take a back seat to this project. I am handling this project to gain approval for the client as well as an A grade. I am in charge of the operations portion of the project as well as contributing to the all aspects of the project. Please feel free to contact me at any time, preferred text, and I will respond as soon as I am able.*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Nicodemus Pederson*

1. **TEAM RULES**

*-Ask for help no matter what, and do not judge those who ask for help!*

*-Wikipedia is not a source!*

*-Participate in all meetings and conference calls- if you cannot be there or will be more than 5 minutes late please let the Team Leader know!*

*-Status updates will be required in the mid-week conference call.*

*-Submissions are due Friday for team review, Final Edits are due by Monday morning to be turned in by Team Lead.*

*-Professional dress on Final Presentation night.*

*-All Emails should have team CC’d and Professor Hootman CC’d.*

*-Do not CC John on all emails; please send only specific questions and Team Leader will send periodic status updates for review.*

*-Do not make assumptions, get facts!*



# General Responsibility Matrix (Enter R, A, C, or I as appropriate)

**The letters in "RACI" stand for:**

* **R**esponsible (they DO it)
* **A**ccountable ("buck stops here" so only one of these)
* **C**onsulted (included in conversations, gives advice/assistance)
* **I**nformed (gets report of progress on this)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | *Tara* | *Tom* | *Nic* | *Maria* | *Hootman* | *Bennett* |
| Project Manager/Documentation Coordinator | R | C | C | C | C |  |
| Meeting minutes | R | I | I | I | I |  |
| Status Reporting | R, A, I | R | R | R | C, I | I |
| Document interim editing | R, A, | R | R | R | C, I |  |
| Document finalization | R, A | C | C | C | I |  |
| Document submission (electronic versions) | R | I | I | I | I |  |
| Component Leader: Finance | R, A | C | C | C | C, I | C |
| Component Leader: Operations | A | C | R | C | C, I | C |
| Component Leader: Environment | A | R | C | C | C, I | C |
| Component Leader: Marketing | A | C | C | R | C, I | C |
| Presentation Slideshow | A |  |  |  | C, I |  |
| Final Presentation | R | R | R | R | I | I |